

STATEWIDE INFORMATION TECHNOLOGY POLICY

Policy: Cellular Devices and Services

Short Title: Cellular Device Policy

Effective Date: July 21, 2006

Approved: Richard B. Clark

Replaces and Supercedes: None

I. Policy Purpose

This policy applies to all Montana state government.

The purpose of this policy is to:

- Establish approval requirements for issuing cellular devices and services
- Establish minimum requirements for cellular device use. Agencies may choose to implement more restrictive policies
- Establish employee responsibilities when issued a State device cellular device
- Lower communication costs
- Improve efficiency
- Provide the ability to respond in emergencies or enhance employee safety

Cellular devices and services are provided to state employees for official State business use only, and are issued when their benefits outweigh their costs.

State devices are assigned to meet State business needs and are not a part of any State employee benefit program.

II. Definitions

Cellular device: A portable device, including cellular telephones, satellite phones, air cards, Blackberry devices and other Personal Data Assistant (PDA) devices, with cellular communications capability. These devices may be State owned/leased (State device) or private owned/leased (private device).

Essential personal calls: Personal calls of minimal duration that cannot be made at another time or from a different telephone. Examples of essential personal calls are calls to arrange for unscheduled or immediate care of a dependent, a

family emergency, or to alert others of an unexpected delay due to a change in work or travel schedule.

Refer to the [Statewide IT Policies and Standards Glossary](#) for a complete list of definitions.

III. Requirements and Responsibilities

A. Requirements for Issuing State Devices

Each agency shall comply with these policy requirements, and may establish additional requirements for their employees.

1. Cellular devices shall be issued when it is more cost effective and efficient than landlines/desk phones, pagers and State contract calling cards. State devices are issued to an individual or a work group. A single individual within a work group shall be assigned responsibility for a workgroup device.
2. Montana state government shall use the existing State contracts for state device services unless there are compelling business reasons to do otherwise. Contract and vendor contact information can be found at the [Department of Administration/Information Technology Services Division web page](#).
3. State agency division administrators or their designees shall review and approve requests for cell equipment and services consistent with these requirements.
4. An authorization form must be completed before a cellular device can be issued. A sample [Cellular Device Request and Authorization form](#) (Appendix A) is provided; however, an agency may create its own form as long as all requirements are met. This form documents the requirements of this policy and provides a record of the equipment and the responsible individual.
5. Eligibility: State devices shall be issued based on one or more of the following job requirements:
 - Employee's job requires field work where landline phones are inaccessible or inefficient
 - Employee's job requires immediate or on-call availability
 - Employee's job requires travel and availability via cellular device

B. Requirements for Usage

1. Personal use of state devices shall be limited to essential personal calls and State business.
2. State device numbers may be ported (transferred) from one vendor to another. The following types of number porting are prohibited:
 - Porting of a state landline business number to any cellular device (state or private device)
 - Porting of a private device number to a state device account
 - Porting of a State device number to a private device account
3. User responsibilities specified in policy [ENT-SEC-081 User Responsibility](#) and [ENT-SEC-041 Transmission Privacy](#) apply in so far as a cellular device under this policy provides a capability listed in those policies.

C. Requirements for Reimbursement of Private Device Costs

If a private device is used for business purposes a reimbursement claim may be made:

- Any reimbursement shall be for verifiable costs in excess of the employee's plan or other fees and taxes incurred as a direct result of the business use.
- Fixed Monthly Rate Option: Agencies that approve using a private device for state business may reimburse employees at a fixed monthly rate:
 - This reimbursement is available to those employees who are required to maintain a private device:
 - for the performance of their job duties and have not been issued a State device, or
 - because their agency has determined it either is more efficient or is essential for the performance of their job duties.
 - The fixed monthly rate shall be no higher than a current State contract plan that would have otherwise been selected based on the number of minutes appropriate for the employees job-related duties.
 - Employees who receive a monthly fixed reimbursement shall be responsible for all state, local and federal taxes.
 - Employees who are issued a State device are not eligible to be reimbursed at a fixed monthly rate.

- If reimbursement requests are submitted regularly, the employee's supervisor should consider assigning a State device to the employee.

D. Responsibilities

1. All agencies of Montana state government

- Are responsible for the appropriate use of cellular devices and services, including employee eligibility, plan usage and proper billing, and enforcement.
- Are responsible to determine cost/benefit criteria for requiring their use of cellular devices based upon the requirements of this policy and applicable business requirements.
- Each agency shall designate one or more Cellular Managers

2. Cellular Manager(s)

The Cellular Manager(s) will:

- Work with employee supervisors to determine best use of cellular devices and plans
- Review all approved cellular device requests
- Determine the most efficient use of minutes and cell plan
- Resolve billing errors applicable to State device contracts
- Maintain inventory records of authorized use of cellular devices to include:
 - Employee-device assignment
 - Assigned plan
 - Justification

3. Employee Supervisor

The Employee Supervisor will:

- Ensure their employees understand this policy and its requirements
- Review individual cellular device assignments quarterly to determine if there is a continuing need and if the cost is justified
- Review vendor billing statements on a monthly basis for overage minutes, incorrect, and reimbursable charges.

4. Employees using cellular devices:

- Are responsible for State device equipment and proper use of the equipment in their possession

- Shall notify their supervisor or appropriate management immediately in the event of damage, loss or theft of cellular devices. The employee shall provide written notification within five business days.
- Are responsible for operating State or private vehicles, or operating other potentially hazardous equipment while in the performance of State business, in a safe and prudent manner while using cellular devices.

State employees are strongly encouraged not to use handheld cell phones or other handheld electronic communications devices or objects while operating state vehicles or personal vehicles on state business. ([ARM, 2.6.210 CELL PHONE USE](#)).

- May request approval to use their private device for State business if they are required to carry a State device. The employee's supervisor may grant or deny such requests.
- Shall check the monthly statement for accurate billing, highlighting calls of a personal nature.
- Shall reimburse the State for all personal calls that result in additional charges to the State
- Shall return State devices to their supervisor when the employee leaves their position or is no longer an authorized cellular device user.

IV. Policy Changes and Exceptions

Policy changes and exceptions are governed by the Policy for Establishing and Implementing Statewide Information Technology Policies and Standards.

Requests for a change to this policy are made by submitting an [Action Request form](#). Requests for exceptions are made by submitting an [Exception Request form](#).

V. Compliance

Compliance criteria for this policy within each agency are:

1. The agency establishes cost/benefit criteria based on business requirements and authorizes and reviews cellular device use based upon that criteria and requirements.
2. The agency selects, applies and maintains the most cost-effective cellular device plans to match usage.
3. Billing errors are identified and corrected on a monthly basis.

4. Costs for personal use other than essential personal calls on state plans are reimbursed to the State.
5. The agency cellular device inventory records are current.
6. Usage and privacy policies are followed.

VI. Enforcement

Policy enforcement is the responsibility of each agency. Enforcement actions for violations of this policy include but are not limited to revocation of cellular device privileges and/or possible disciplinary action up to and including termination.

VII. Closing

This policy shall be followed unless it conflicts with negotiated labor contracts or specific statutes, which shall take precedence to the extent applicable.

For questions or change requests on this policy, e-mail ITpolicy@mt.gov, or, contact the Information Technology Services Division at:

Chief Information Officer
PO Box 200113
Helena, MT 59620-0113
(406) 444-2700
FAX: (406) 444-2701

VIII. Cross Reference Guide

A. State Policies and Forms - IT Policies, Montana Operations Manual (MOM) Policies, Administrative Rules of Montana (ARM) Policies

- Policy for Establishing and Implementing Statewide Information Technology Policies and Standards (pending)
- [ENT-SEC-081](#), User Responsibilities
- [ENT-SEC-041](#), Transmission Privacy
- [ARM, 2.6.210](#), Cell Phone Use
- [ARM, 2.13.102](#), Use of the State's Telecommunications Systems
- 1-1103.01, MOM, Use of the State Telephone System (not available online)

B. IT Procedures or Guidelines

- Procedure for Establishing and Implementing Statewide Information Technology Policies and Standards (pending)
 - [Action Request for Statewide IT Policies or Standards](#)
 - [Exception Request for Statewide IT Policies or Standards](#)

IX. Administrative Use

History Log	
Approved Date:	July 20, 2006
Effective Date:	July 21, 2006
Change & Review Contact:	ITpolicy@mt.gov
Review:	Event Review: Any event affecting this policy may initiate a review. Such events may include a change in statute, key staff changes or a request for review or change.
Scheduled Review Date:	One year from Effective Date
Last Review/Revision:	
Changes:	

Appendix A
CELLULAR DEVICE REQUEST AND AUTHORIZATION FORM

Request date: _____

Job responsibilities that justify issuing a cellular device: _____

Signature: _____ Date: _____
Division Administrator or appropriate supervisor

All employees sharing the cellular device are responsible for reading the policy and signing here. Please designate the individual with primary responsibility for the equipment.

I have read the Policy for Cellular Devices and Services and agree with its terms and conditions. In addition, I agree to follow all employee responsibilities as described in the policy.

Employee name (print): _____ **Signature:** _____
Responsible individual

Employee name (print): _____ Signature: _____
Shared user

Employee name (print): _____ Signature: _____
Shared user

Employee name (print): _____ Signature: _____
Shared user

NOTE: Names and signatures of additional shared users can be written on the back, or attached.

Agency/Division/Bureau: _____
Organization Number: _____

-----Cellular Manager Use Only-----

Device phone number: _____ Activation date: _____
Telephone model: _____ Serial Number: _____
Plan/Minutes: _____

Device phone number: _____ Activation date: _____
Telephone model: _____ Serial Number: _____
Plan/Minutes: _____

NOTE: Additional devices may be listed on this form.